

PUBLIC ASSISTANCE LUMP SUM INELIGIBILITY NARRATIVE

NEW YORK STATE

OFFICE OF TEMPORARY AND DISABILITY ASSISTANCE

WBGTPA ** PA BUDGET ** VERSION ① DIST / /

CASE NAME CASE NO. OFC UNIT WORKER TRAN CASE IVD

HH	CA	DP-HH	DP-CA	HC	LF	PI	SI	PSP	PSF	*****EARNED INCOME*****								
TY	R				ACTUAL	ALLOW				#	LN	30I	30M	SRC	FRQ	D	CCR	
						0				1:								
					②	0				2:								
										*****OTHER INCOME*****				0	GROSS		④	0
							LN	SRC	F	AMOUNT	EXEMPT			0	TAXES		0	
														0	NYS DIS		0	
										③	0	0	0	WORK EXP			0	
											0	0	0	EXEMPT			0	
							TOTAL NET					0	0	CH CARE			0	
							\$\$\$\$PA GRANT\$\$\$\$						0	CH CARE			0	
							TOTAL NEEDS				0	0	CH CARE				0	
							TOTAL INC				0	0	DISREGARD				0	
							CD / AMT				0	0	TOT DED				0	
							RECOUPMENT				0	0	UNAVAIL				0	
							UTIL/RES				0	0	NET INC				0	
							SHELT/RES			⑥	0		*	INELIGIBLE DATE	*		REM	
							RESTRICTED				0		TO					
							SEMI CASH				0		DATE STORED	/	/		⑦	
							SEMI N-CASH				0							
							*****RECOUPMENT*****											
							TY	BALANCE	%	MO	AMT	REM						
									0	00.0		0	0					
											⑤	0	0					
									0	00.0		0	0					
										00.0		0	0					
							RECALC											
							FS CASE NO.											

THE PUBLIC ASSISTANCE (PA) BUDGET ABOVE SHOWS HOW FINANCIAL DATA HAS BEEN USED TO CALCULATE YOUR INELIGIBILITY FOR PUBLIC ASSISTANCE (FOR THE PERIOD OF TIME SPECIFIED IN SECTION 7) BECAUSE A PERSON(S) IN YOUR HOUSEHOLD RECEIVED INCOME IN A LUMP SUM PAYMENT. ALL ENTRIES ARE PER MONTH. THE LAST TWO NUMBERS OF ANY MONEY AMOUNT ARE CENTS.

Section 1: The top part of the form identifies this as a PA budget for your household (CASE NAME). The number appearing under “CA” includes those persons who receive assistance. It may also include, under certain circumstances, a non-recipient(s) living with you who have legal responsibility for any person(s) receiving assistance.

Section 2: This is a summary of your family’s needs, as determined by statewide schedules of need. These schedules are known as the “Standard of Need”. In the “ACTUAL” column is the amount of rent, water, etc., which you reported as actually being paid. In the “ALLOW” column is the amount which is being used to calculate your budget. The amounts in this column which appear next to “BASIC”, “ENRGY”, “SPMNT”, “SHELT” and “FUEL” are determined by the number of persons in your PA case. The BASIC amount is intended for use in meeting essential needs common to all households such as food, clothing, and non-heating electricity. The ENRGY and SPMNT amounts are for meeting domestic energy costs. The SHELT amount is intended to be used in paying for shelter expenses. The FUEL amount is intended to be used in paying for heating of your home. If any amounts are shown opposite the three fields labeled “OTHER”, they represent additional allowances to which you may be entitled. If amounts are present opposite the third “OTHER” field, a supplemental child care allowance has been budgeted. The amount which appears next to “TOTAL NEEDS” is the sum of your total monthly needs (rounded down to the next whole dollar), based on the “Standard of Need”.

Section 3: This is income received from a source other than a job. Some examples are Social Security Benefits, Unemployment Insurance Benefits, or Veteran’s. In the “SRC” column is a code number for the source of the income which appears in the “AMOUNT” column. Income which appears in the “AMOUNT” column is reduced by the amount appearing in the “EXEMPT” column before it is budgeted against your PA needs. This section may also show income from a source other than a job which was received in a lump sum. Some examples are New York State Disability payments, lottery winnings or an inheritance. If the income which a member(s) in your household received was not earned from a job, and was received in a lump sum, Code 26 appears in this section alongside the amount of the lump sum income

Income Exclusions - Some money which you may have reported is not counted as income and does not appear on the budget. An example of this is income from Educational Grants and Loans.

Section 4: This is income that you reported as being received from a job or through self employment. (Usually the allowable costs of doing business are subtracted before being recorded on the budget for self-employment income: however, income from Roomers or Boarders/Lodgers is noted in "EXEMPT" below.) The top two lines of Section 4 contain coded information about which case member receives income (LN), if there is a work deduction (30I and 30M), the source of the income (SRC), how often the income is received (FRQ) and if the job is full or part-time (D). The total amount from each source of employment is entered in each column. The meaning of each category is:

"GROSS"	Gross income before any deductions. If the lump sum income which was received by a member(s) of your household was earned income from a job, the amount of the lump sum appears here and either Code "12" or "13" appears under "SRC" in the top row of Section 4. (This includes the income of any person whose income we must count but who is sanctioned.)
"TAXES" "NYS DIS"	These fields may display amounts only if the budget relates to a period prior to May 1, 1985. They show the total amount of Federal, State, NYC and Social Security (FICA) taxes, and NYS Disability Payments which would not be counted as income available to meet needs.
"WORK EXP"	Person(s) with earned income receive a \$90 deduction. This deduction is not given when a recipient, without good cause, quits his job, reduces his earnings, refuses to accept employment or does not make a timely report of income.
"EXEMPT"	If you have income from Roomers or Boarder/Lodgers, the amount of income that is considered exempt (cost of doing business) will be shown here.
"CH CARE"	This field is only for budgets prior to 10-01-97. It reflects a formerly allowable deduction to persons who paid child care so that they could work.
"DISREGARD"	This is a special work incentive deduction which public assistance families with children may receive under specific circumstances.
"TOT DED"	This is the sum of the total deductions listed above.
"UNAVAIL"	This is the amount of net earned income which is applied against the needs of the persons included in another case
"NET INC"	The Net Income is equal to the Gross Income minus the total deductions and unavailable amount.

Section 5: The type and balance of any outstanding recoupment (overpayment) is shown.

Section 6: This section is a summary of Sections 2, 3, 4, and 5. The amount next to "TOTAL NEEDS" is the total needs from Section 2. "TOTAL INC" is Sections 3, and 4 added together. The amount next to "CD/AMT" is equal to your total needs subtracted from your total income. The Code "S" next to "CD/AMT" shows that the budget is a surplus. The period for which you will be ineligible to receive assistance is calculated by dividing your "TOTAL INC" by your "TOTAL NEEDS".

Section 7: The dates listed under "INELIGIBLE DATE" show the period that your household will be ineligible to receive public assistance. The amount under "REM" is the remaining income which will be applied against your needs in the month following the period of ineligibility, if you reapply for public assistance.